



## Conducting a Procurement





# Introductions



- Name
- From (what agency?)
- Are you a current Comm-PASS user?





# Class Objectives



After today's session, you will be able to:

- Create an open market requisition
- Create, evaluate and award a bid
- Score a bid using the online scoring tool
- Create Bid Amendments
- Create a Master Blanket Purchase Order (Contract)



# Project Schedule



**COMMBUYS Go Live  
Phase I**  
March 24, 2014  
(Comm-PASS retired)

**COMMBUYS  
Phase II**  
September 2014

**Winter -  
Summer 2015**

## Summer 2013

- Contract awarded (June) and project launched
- Team ramp up
- Application review

## Fall 2013

- Functional requirements and design
- Agency readiness program launched
- Vendor outreach campaign launched

## Winter 2014

- Application configuration and User Acceptance Testing
- End User training
- Agency readiness program continues

## Spring/Summer 2014

- Build interfaces to MMARS and other systems
- Ongoing End User training
- Ongoing outreach to municipal governments and other eligible entities



# Overview of COMMBUYS



What is COMMBUYS?

*It is the Commonwealth of Massachusetts' Executive Office for Administration and Finance, Operational Services Division(OSD) web-based Electronic Procurement and Purchasing System, referred to as COMMBUYS.*

*COMMBUYS will replace the existing Commonwealth Procurement Access & Solicitation System (Comm-PASS) bid solicitation system with a fully functional and integrated eProcurement system.*



COMMBUYS puts Commonwealth agencies in the driver's seat, fully automating the procurement process and supporting data-driven business decisions.



# Procurement Policy Update



The way departments currently do business with OSD is not changing.

- Existing OSD policy is not changing.
- Existing Finance policy is not changing.
- COMMBUYS is a new system tool departments will use for procurement and purchasing.
- New COMMBUYS policy will be introduced in March on how departments will use the system for procurement and purchasing.







# Executive Agency Procurement Responsibilities



- Use all Statewide Contracts, if available.
- Comply with all applicable laws, regulations, policies and procedures.
- Accept responsibility and be accountable for procurement.
- Conduct open, fair and competitive procurements.
- Maintain and update bids (solicitations) and contracts in COMMBUYS.
- Review Contract language and manage performance.



# COMMBUYS Terminology



<b>Comm-PASS Term</b>	<b>COMMBUYS Term</b>
Solicitation (all types)	Bid
Vendor Responses, Proposals	Quote
Statewide or Departmental Contract	Master/Blanket Purchase Order
Purchase off SWC	Release Requisition
Not on a contract or Incidental	Open Market Requisition
Request for Purchase	Requisition





# Current Procurement Task Lists



The chart below describes the current Comm-PASS process and the new COMMBUYS process for purchasing from a contract.

What Procurement Staff do now:	What Procurement Staff will do after 3/24/14:	Compare Compass to Commbuys
1. Build a Sourcing Team and Charter.	1. Build a Sourcing Team and Charter.	
2. Research and create Buyer and Seller Profile.	2. Research and create Buyer and Seller Profile.	
3. Write a Request for Response.	3. COMMBUYS will have available on-line templates that can be used to create the RFR in the application.	
4. Create and post a Solicitation and attach the Request for Response (RFR) on the Solicitation tab in Comm-PASS.	4. Procurement staff or designee create a Bid and attach RFR on the Blanket Purchase Order PO created in COMMBUYS.	
5. Suppliers submit Bids via email/fax/post.	5. Suppliers will be able to respond on-line with their Bid responses.	
6. Purchaser evaluates Bids, through an off-line process.	6. Procurement staff or designee will have the option to establish evaluation criteria in COMMBUYS that will automatically calculate the points as designed by the team.	
7. Purchaser updates Solicitation status in Comm-PASS and system notifies all vendors associated with the Solicitation category of the status.	7. Procurement staff or designee will award contract and system will automatically send the award/non-award notices.	
8. Purchaser posts Contract in Comm-PASS and CT or MA (master service agreement) in MMARS.	8. Buyer will create contract with information brought forward from the Bid documents. In COMMBUYS Phase 2, the CT or MA will be generated and interfaced to MMARS.	



# Current Procurement Task Lists



OPERATIONAL SERVICES DIVISION

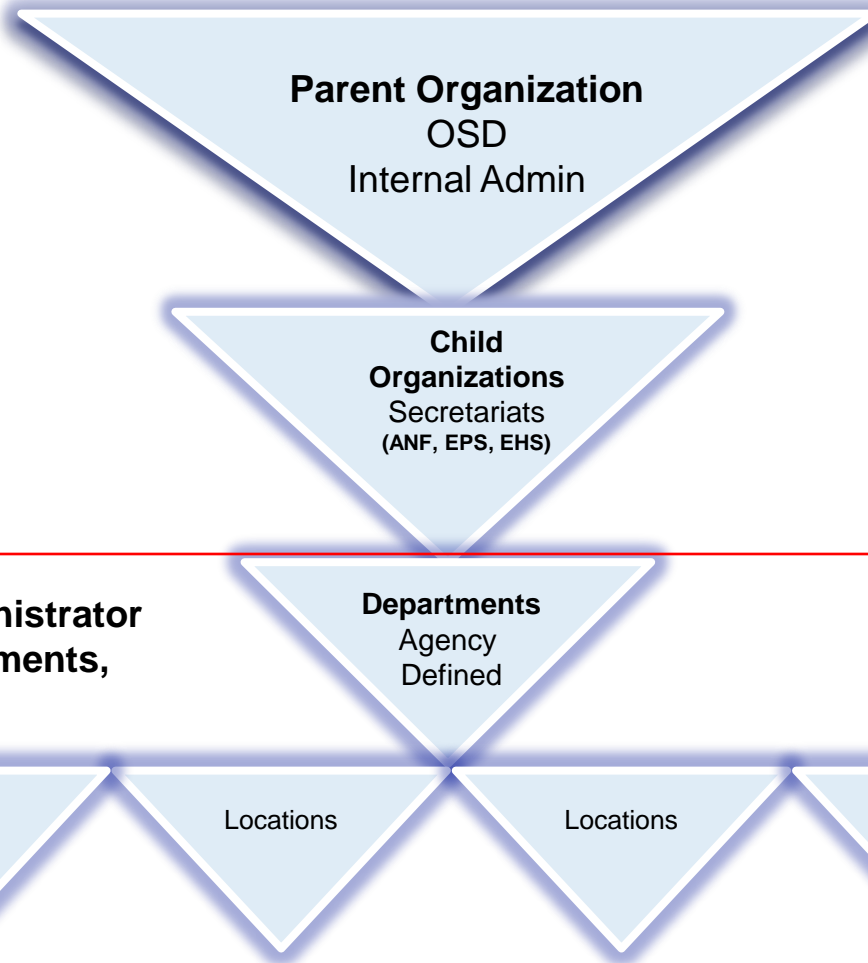
What Procurement Staff do now:	What Procurement Staff will do after 3/24/14:	Compare Compass to Commbuys
1. Build a Sourcing Team and Charter.	1. Build a Sourcing Team and Charter.	Same
2. Research and create Buyer and Seller Profile.	2. Research and create Buyer and Seller Profile.	Same
3. Write a Request for Response.	3. COMMBUYS will have available on-line templates that can be used to create the RFR in the application.	Was in PIC now in Commbuys
4. Create and post a Solicitation and attach the Request for Response (RFR) on the Solicitation tab in Comm-PASS.	4. Procurement staff or designee create a Bid and attach RFR on the Blanket Purchase Order PO created in COMMBUYS.	New term!
5. Suppliers submit Bids via email/fax/post.	5. Suppliers will be able to respond on-line with their Bid responses.	Technically not new but now encouraged
6. Purchaser evaluates Bids, through an off-line process.	6. Procurement staff or designee will have the option to establish evaluation criteria in COMMBUYS that will automatically calculate the points as designed by the team.	NEW!
7. Purchaser updates Solicitation status in Comm-PASS and system notifies all vendors associated with the Solicitation category of the status.	7. Procurement staff or designee will award contract and system will automatically send the award/non-award notices.	NEW!
8. Purchaser posts Contract in Comm-PASS and CT or MA (master service agreement) in MMARS.	8. Buyer will create contract with information brought forward from the Bid documents. In COMMBUYS Phase 2, the CT or MA will be generated and interfaced to MMARS.	NEW!



# Organizational Structure



**Preloaded into  
Commbuys**



**The Organization Administrator  
needs to set-up Departments,  
Locations and Users**

# User Roles in COMMBUYS



OPERATIONAL SERVICES DIVISION

ROLE	Function
Internal Administrator	<ul style="list-style-type: none"> <li>OSD only role; Internal Administrators serve as the top-level administrator within the system and are able to determine which organizations and vendors have access to the system, as well as to manage centralized document and accounting settings, access restrictions and the look and architecture of the system.</li> </ul>
Organization Administrator	<ul style="list-style-type: none"> <li>Set-up users in the procurement process for an organization, including its Departments, Locations, users and approval paths. Procurement managers have the role of Organization Administrator.</li> </ul>
Basic Purchasing (BP)	<ul style="list-style-type: none"> <li>Create and view all purchasing documents including Requisitions, Receipts, Purchase Orders, Bids and their related documents such as Amendments and Change Orders.</li> </ul>
Department Access (DA)	<ul style="list-style-type: none"> <li>Create Requisitions and/or approve the Requisitions of others.</li> <li>Generates requisitions, solicitations off SWC/ blankets</li> </ul>
Inquiry	<ul style="list-style-type: none"> <li>View documents for their Organization, but are unable to control or edit any document. Auditors are given the Inquiry role. Can view fully executed documents (does not include drafts or documents in the process of scoring) but does not allow them to make any changes or take any actions that impact documents or related processes.</li> </ul> <p><i>* The difference between what a public user can see and what an Inquiry user can see is that public users never see any requisitions, receipts(phase 2) or the approval audit trail internal to the purchasing organization – using the public view they only see Bids, Contracts and Bid Award.</i></p>




# Approval Paths



Approval Path appears after Requisition is submitted.

## Original Requestor on Summary Tab



Approval Paths:							
Delete	Approver	Order Sequence	Approval Path ID	Level	Approver Type	Date Requested	Approved/On Hold
	Alyssa Arnold	1	0001	0	Primary	01/29/2014 05:27:09 PM	01/29/2014
	Thomas Clayton	1	0001	0	Alternative	01/29/2014 05:27:09 PM	
	Paul Comparetti	1	0001	1	Primary	01/29/2014 05:27:09 PM	
Add New							
						Add Default Approver	
Cancel Requisition    Close Requisition    Print							
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## Approver View

Saved Requisition is routed for approval and conversion to PO based on approval paths set up by Organization Administrator

Users approving purchases are likely to have the **Basic Purchaser** security profile.

Home - Welcome Back Alyssa Arnold

News(1) Dashboard Reqs(35) Bids(29) PO(1) **Approval(12)** My Reminders(0) Events(0)

### My Documents Pending Approval

Requisition #	Requisition Date	Description	Approval Requested	Approver	Approval Status	Date Approved
<a href="#">1400325</a>	01/30/2014	Approval actions	01/30/2014 09:13:57 AM	Alyssa Arnold	Waiting...	
<a href="#">1400322</a>	01/29/2014	AA - Pens	01/29/2014 05:27:09 PM 01/29/2014 05:27:09 PM 01/29/2014 05:27:09 PM	Alyssa Arnold Thomas Clayton Paul Comparetti	Approved Approved Waiting...	01/29/2014 05:27:18 PM
<a href="#">1400265</a>	01/09/2014	Job Aid Test	01/09/2014 05:10:45 PM 01/09/2014 05:10:45 PM 01/09/2014 05:10:45 PM	Alyssa Arnold Thomas Clayton Administrator System	Approved Approved Waiting...	01/09/2014 05:10:55 PM
<a href="#">1400138</a>	12/02/2013	Catalog	12/02/2013 04:45:37 PM	Test User	Waiting...	
<a href="#">1400135</a>	12/02/2013	Quick Buy Requisition	12/02/2013 04:27:21 PM	Test User	Waiting...	

[View More...](#)

Purchase Order #	Change Order #	Purchase Order Date	Description	Approval Requested	Approver	Approval Status	Date Approved
0000119	1	12/03/2013	Test	12/09/2013 04:11:50 PM	Buyer Buyer	Waiting...	

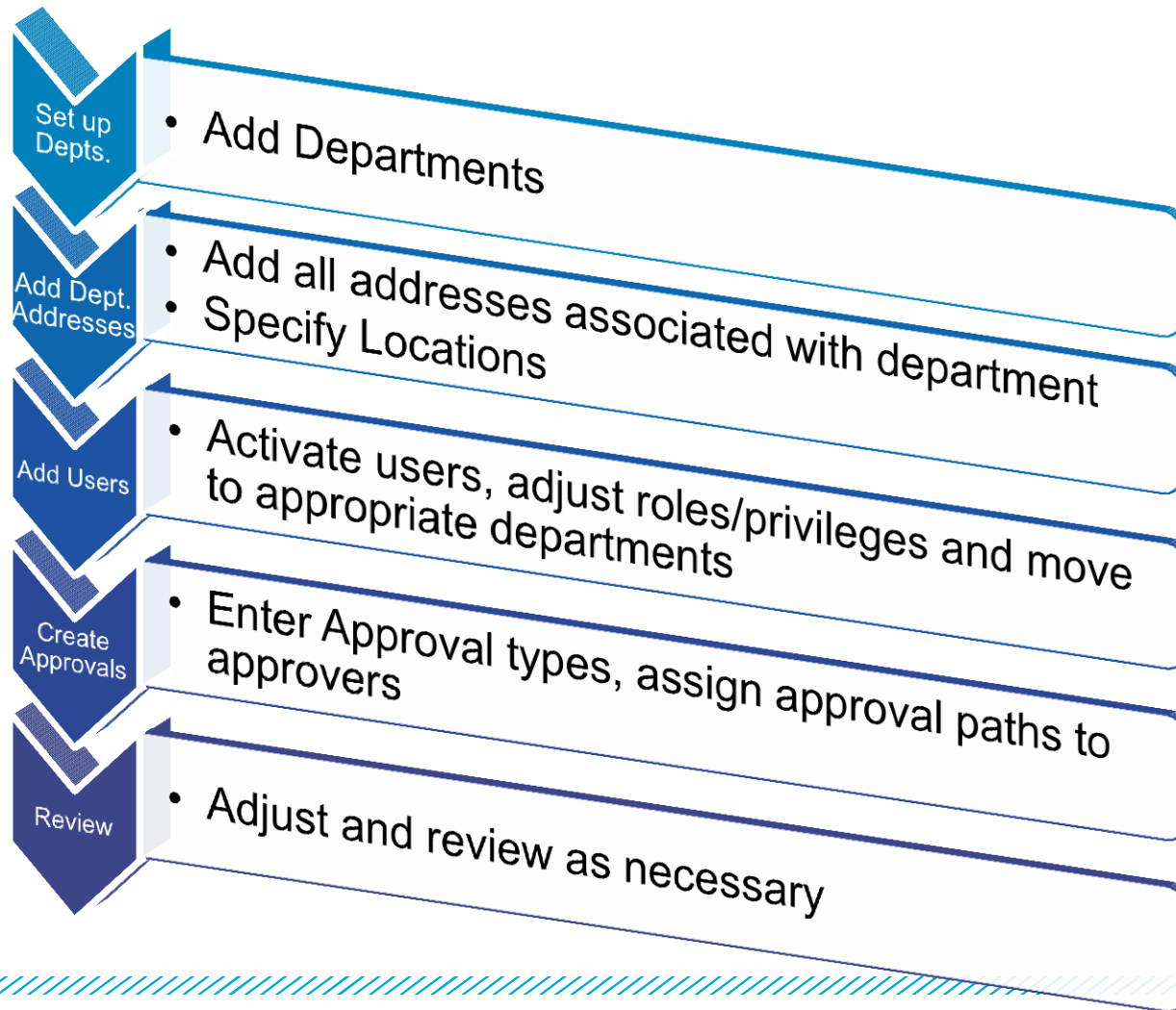
### Documents Pending My Approval

Requisition #	Requisition Date	Description	Account Fiscal Year	Type	Requestor	Dept/Loc	Total
<a href="#">1400325</a>	01/30/2014	Approval actions	14	Open Market	Alyssa Arnold	PURCH / LOC1	\$3,000.00

[List & Approve](#)



# OA Basic Set-up Tasks





# Document Types

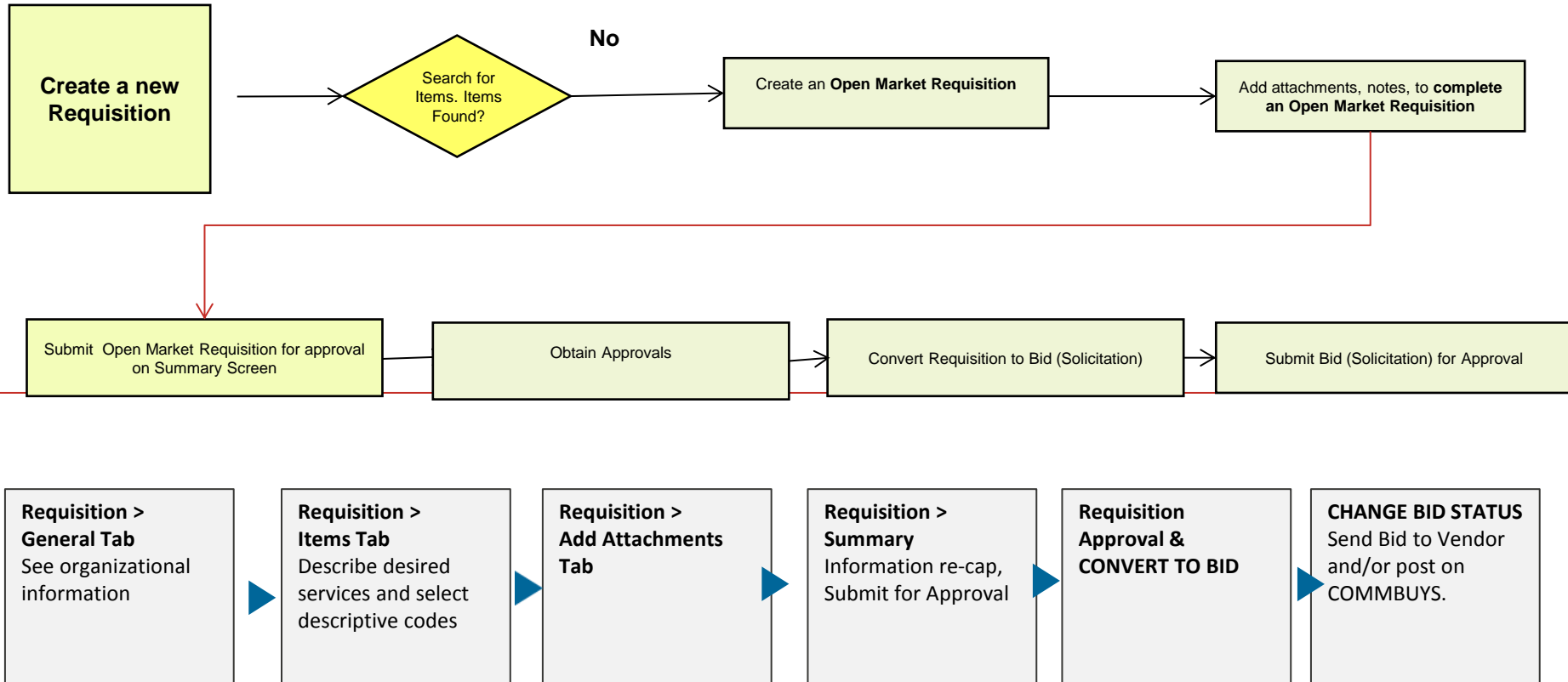


Name	Types
Requisitions	<ul style="list-style-type: none"><li>• <b>Release:</b> is a purchase from a Master Blanket Purchase Order/Contract</li><li>• <b>Open Market:</b> is not on a Master Blanket Purchase Order/Contract</li><li>• <b>RPA:</b> is for emergency purchases</li></ul>
Bids	<ul style="list-style-type: none"><li>• <b>Open:</b> any vendor can submit a response</li><li>• <b>Closed:</b> only selected vendors can see a bid</li></ul>
Purchase Orders	<ul style="list-style-type: none"><li>• <b>Open Market:</b> refers to procuring goods or services not on a contract</li><li>• <b>Blanket:</b> is the terminology for a contract</li><li>• <b>G2B:</b> is a catalog</li><li>• <b>Change Order:</b> request to change a Purchase Order</li></ul>



# COMMBUYS Requisition Process

Always Start with a Requisition



# COMMBUYS BIDS and Purchase Order Process

Always Start with a Requisition for BIDS and Purchase Order

## Create A Requisition

**BIDS Workflow**

Convert Requisition to Bid (Solicitation)

Submit Bid (Solicitation) for Approval

Obtain Approvals

Post Approved Bid

VENDOR Receive Notification of Posted Bid

**BIDS COMMBUYS**

Requisition Approval & **CONVERT TO BID** on Summary Screen

**Go to General Tab**  
**Select Blanket from Purchase Method**  
**and input Blanket Dates**, Add Vendor if necessary, from Vendor Tab

Click **Submit** button for **Approval** on **Summary Tab**. Approval(s) receive email

Once Approved, and when its ready to open (status) **Open Bid on BID TAB**, to **evaluate, scoring, award bid**

**Send for Approval and Notify Vendor** on **Summary Tab** check email and notify vendor

**Purchase Order Workflow**

Convert Approved Bid to Purchase Order

Submit Purchase Order for Approval

PO Approved

Set PO Status to Sent

Transmit Approved PO to Vendor

Order Filled

**PURCHASE ORDERS COMMBUYS**

Locate **BIDS>Approved** OR **Documents>Bids >Approved**

**Summary TAB> BID Tabulation** populates, **Select (PO) to create Purchase Order**

Creation preview populates. Select Continue, **BID Blanket – Purchase order** is created.

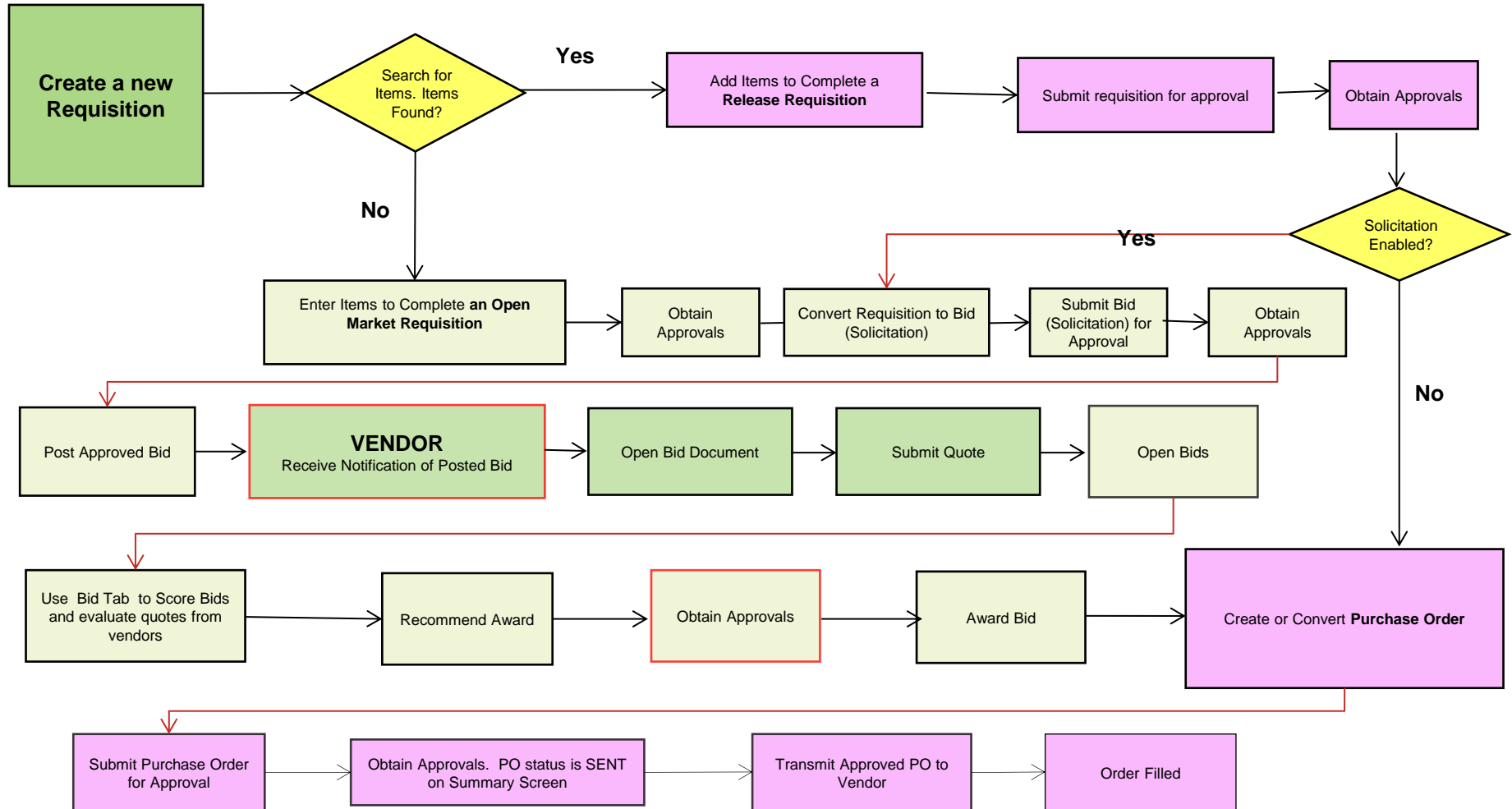
Open PO from Home screen **In progress status**

Default to Summary screen, Click ok to submit for approval. Once approved, **PO>Ready to Send**

The PO opens with **READY to SEND** status. Send email and Notify Vendor. Click Save and Continue.



# CommBuys Workflow

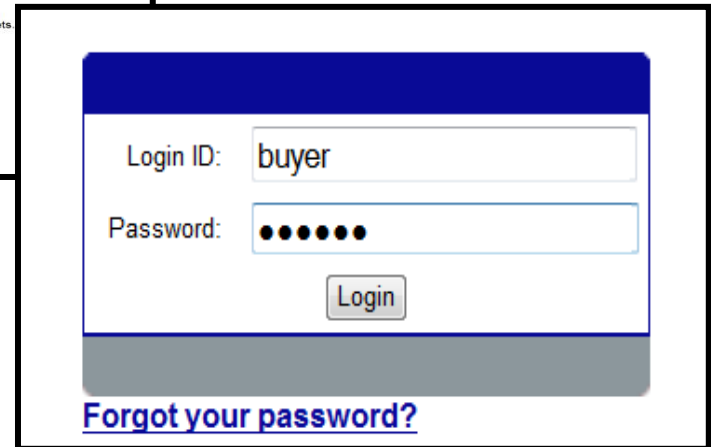
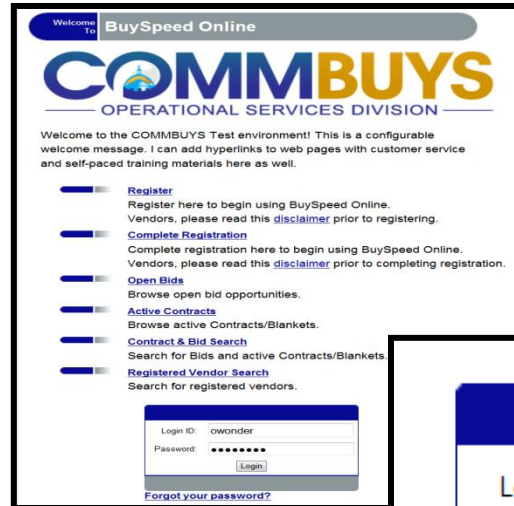




# Initial COMMBUYS Login



- <https://www.training.commbuys.com/bso/>
- COMMBUYS login page
- Enter the Login ID / Password created during registration
- Click the **Login** button



**Stay up to date on the *MASSbuys* EXPO**

**May 1, 2014**

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**Worcester, MA**



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